



*Town of Lexington*  
**Assessor's Office**

Tel: (781) 698-4578

Fax: (781) 861-2733

Dear Taxpayer:

Enclosed please find your **Clause 41A Deferral** Exemption Application for Fiscal Year 2016.

The filing deadline for Fiscal Year 2016 is 3 months after the first **Actual** tax bill is mailed (on or about January 1<sup>st</sup>).

***The Fiscal Year 2016 Fixed Interest Rate is now .025% (simple interest).***

You must complete the following sections of the Deferral Application in order for our office to process your application.

1. Section A (Ownership as of July 1, 2015)
2. Section B (Top of Page 2)
3. Section C (Gross Income for **CALENDAR YEAR 2014**) – **GROSS INCOME LIMIT \$65,000**
4. Section D (Signature)

**The following must be enclosed along with your application:**

- ☐ **2014 COMPLETE Federal Income Tax Return “AND” State Income Tax Return**
- ☐ **State Income Tax Circuit Breaker (CB Form) if applicable**
- ☐ **All 2014 1099 Forms**
- ☐ **All 2014 W-2 Forms**

**For Properties Held in Trust –Enclose the Following (unless already on file with the Assessor's Office):**

**The applicant must be a Trustee of the Trust “AND” be an individual beneficiary of the trust.**

- ☐ **Copies of the Entire Trust Document**
- ☐ **Verification of Trust Form (If applicable)**

**Please Note:**

**The Complete Trust, Amendments and Schedules “Must” Be Recorded at the Registry of Deeds.**

**Your application cannot be processed unless complete and with all of the required copies.**

If you have any further questions, please contact our office at 781 – 698 – 4578.

Town of Lexington  
Assessor's Office